



# Team Activity

# Team Activity

## Series 3 Team Mastery

### Session 9 Mastering the Art of Case-Building and Getting Buy-in and Involvement From Your Patients to Increase Case Acceptance on Comprehensive Treatment (Part 2)

**Listen Online**  
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1. Make a copy of this worksheet for each team member to use.
  2. Complete the Team Activity.
  3. Fax or email one “Master Worksheet” containing your team’s collective efforts.
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## Send Us Your Master Worksheet

**Fax**  
**615-807-3301**

**Email**  
**[Champions@DentalSuccessToday.net](mailto:Champions@DentalSuccessToday.net)**

# Team Activity

## Step 1

### Review the Fifteen Components of Case Building

In your last Practice Focus, Scott explored the fifteen components to mastering the art of case building and getting buy-in and involvement from your patients to increase case acceptance on comprehensive treatment.

These components will help you when you're role-playing later on in this Team Activity, so take a moment to review them now.

Of course, feel free to return to and reference this list while role-playing together.

#### The Components of Case Building

1. Pre-Framing
2. What Are We Here to Do?
3. What Are Your Goals and Vision of Success?
4. What Else?
5. Building Rapport
6. Layers of Health
7. Tools to Use
8. Origin of the Problem
9. Why Something is Happening
10. How to Fix It and Prevent It
11. What Do You Want to Do, See Happen, and Go From Here?
12. Establishment of the State of Ideal and What Optimal Is and Looks Like
13. Avoid Dumping Diagnosis
14. Talk From the Pictures and Models and Apply It Back to the Patient
15. Commit to Every Transfer and Handoff Being Done Verbally and With a Triangle

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## Step 2 Guide to the Tag Team Approach

### What is the Tag Team Approach?

The Tag Team Approach culminates everything from the patient engagement, communication, case building and triangles all at once. It's more than a handoff; it's two team members harmoniously interacting with a patient to bring about full awareness of, and desire for, a true state of optimal health.

### The End Goal of the Tag Team Approach

A more committed patient, a more comprehensive case, a more complete clinical yes, and thorough case acceptance.

### The Three Keys to Reaching That Goal

1. Be prepared
2. Be present
3. Be patient

### Three Helpful Triangle Tactics

1. Never leave the patient alone
2. Complete the triangle via discussion
3. That discussion begins by restating main points to the patient

### Note

The team member walking into the triangle shouldn't speak first. The anchor explains what's happened, where the patient is at with it and what's next.

### Conversation Starters

### Remember

Patients will only buy an outcome they want. So each question you ask, response you give, and triangle you create is for displaying and reinforcing deep benefits of the treatment outcome.

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## **An assistant always introduces the doctor and the doctor always responds...**

*"Here's (Doctor)."*

*"Hi (Assistant). So tell me, what have you and (Patient) discussed today? How's (Patient) doing with their hygiene?"*

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## **Assistant and patient in an emergency situation...**

*"(Patient), you've come in for a serious emergency problem. When the doctor comes in, of course we're going to discuss with you how to solve the problem that brought you in today. But we're also going to go one step further: we're going to make sure we don't have any other underlying concerns that'll put you back in an emergency situation like this one again."*

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## **Doctor and patient in an emergency situation...**

*"I'm happy you're here and making proactive steps with your health. I'm sure my assistant told you about the fact that just because you have one emergency today doesn't mean we won't have another one later on. What I would really emphasize to you is that we should thoroughly see what's happening here, and that we should have you go through a comprehensive exam to ensure we can get out ahead of any problems that may be waiting to happen for you in the future. Bow, I'll have (Assistant) here share with you about our comprehensive exam and what it entails."*

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## **Assistant and patient...**

*"(Patient) what I want to do now is share some things that patients in similar shoes as your have asked or been curious about."*

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## Assistant and patient preparing for a triangle with the doctor...

*"Having the benefit of knowing what I know about optimal dental health, if I were you and I was looking at this picture, these are the questions I'd be asking when I saw my doctor..."*

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## Assistant and doctor setting each other up in a triangle with the patient...

*"What do you think about doing this?"*

*"Have you talked to the patient about this?"*

*"Why don't you take a few minutes and explain the benefits of \_\_\_\_\_?"*

*"What would you do for a longterm, permanent solution?"*

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## Assistant or doctor speaking directly to the patient when in the triangle...

*"(Patient), tell me how you're feeling..."*

*"What do you notice about this?"*

*"Or course, (Patient), you realize this isn't going to fix itself. I'm curious, (Assistant or Doctor), what do you think we should do to help (Patient)?"*

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## Why We Do This

**We open up this dialogue and involve patients in it so we don't come across as though we're merely dumping diagnosis on them.**

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## Tips For Dynamic Dialogue

Look in your patient file and rekindle previous conversations about treatment that's necessary for your patient to reach the state of ideal.

Use your photographs as reference of what you've discussed in the past and as a comparison tool for how your patient's condition has changed over time.

Always be sure to expand your conversations to the bigger picture.

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## Step 3 Role-Play the Tag Team Approach

**It's time to apply your knowledge and role-play!**

**First, get into groups of three and role-play with one team member playing patient while the other two practice the Tag Team Approach.**

### **Note**

To get the maximum affect of this exercise, use actual patient examples. Pull up real records and photographs and relive patient interactions.

**Then, do the same for patients coming up on the schedule in the near future.**

### **Tip**

Start with a scenario in which you're reviewing photographs together with a new patient. It's an easy place to start and gain momentum before you move on to role-playing other scenarios.

**Role-play all applicable scenarios in your practice:**

- New patients in hygiene or operative
- Emergency
- Existing treatment
- No treatment
- Something new has been discovered

**For those of you on the Business Team, you aren't left out of this!**

**You can be doing the same thing with your initial patient interviews and you can use the Tag Team Approach in treatment presentations.**

**For every old patient that hasn't had a conference exam, is being reactivated, or is even coming in for emergency due to negligence, complete the full new patient experience once again.**

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Always use the Tag Team Approach on the final triangle and absolutely on every case presentation where a formal treatment conference is being done. Wherever there are two team member with a patient, the Tag Team Approach should be employed.

In this role-playing exercise, run through your new patient experience and practice using the Tag Team Approach for the scenarios listed below:

- Old patient that hasn't had a conference exam
- Old patient being reactivated
- Patient coming in for emergency (due to negligence)
- A new patient case that's especially applicable to your practice

## Remember

Challenge each other to involve the patient with back-and-forth dialogue, all while still controlling the flow of the conversation.

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## Role-Playing Notes

Before you begin, choose who will be documenting your flow and findings through this part of the Team Activity.

Your scribe will begin by writing each patient scenario you agree to practice your Tag Team Approach for. Then, they'll write which team member roles are involved in the triangle.

During / after role-playing each scenario, document any personal notes, observations or helpful conversation starters you discover together.

### Remember

You can refer back to the 15 components for case building, as well as conversation starters and scenarios referenced earlier in this training.

### Scenario

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### Team Roles Involved

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### Notes / Observations / Conversation Starters

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# Team Activity

**Scenario**

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**Team Roles Involved**

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